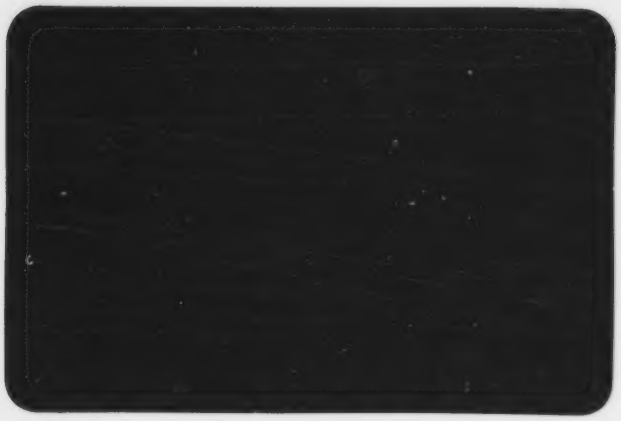

Prepared by the International Trade Development Branch

Publication préparée par le Secteur de l'expansion du commerce extérieur

External Affairs and International Trade Canada

Affaires extérieures et Commerce extérieur Canada

THE EUROPEAN BOATING INDUSTRY

AND MARKET

INTRODUCTION - THE EUROPEAN BOATING INDUSTRY AND MARKET

The purpose of this report is to introduce prospective manufacturers and exporters of pleasure boats to the market in a number of European countries, to provide information on the domestic industry of the countries concerned, on the size of the market through export and import statistics, and on major boat shows, dealers, and useful sources of information.

The information contained in the report has been obtained from the countries and associations concerned, by Trade Commissioners and Commercial Officers serving at Canada's diplomatic missions in Europe.

Compilation of the report has been carried out by the

Machinery and Transportation Equipment Division
External Affairs and International Trade Canada
125 Sussex Drive
Ottawa, KA 0G2
TEL: (613) 996-1431
TLX: 053-3745
FAX: (613) 996-9265

An additional source of statistics and market trends is the International Council of Marine Industry Associations (ICOMIA) which annually publishes BOATING INDUSTRY REPORTS/STATISTICS. The address of the London Office is:

Boating Industry House
Vale Road
Oatlands, Weybridge
Surrey, England
KT13 9NS
TEL: 0932-854511
TLX: 885471
FAX: 0932-852-874

From the 1989 REPORTS we have taken extracts of the General Observations and Market Trends and included them in Appendix II as there are useful insights on the state of the European market.

External Affairs and International Trade Canada would welcome your comments on the report and any suggestions as to how it could be made more useful to potential exporters. If the report is found to be useful, it will be updated and expanded to include other countries.

JUNE 1990

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DENMARK - BOATING INDUSTRY & MARKET

In 1987, according to a registration survey conducted by the Danish Boating Industry Association, there were 37,000 pleasure craft (over 20 feet), of which 25,000 were sailboats and 12,000 motorboats.

There are no statistics available on boats under 20 feet.

DANISH BOATING INDUSTRY ASSOCIATION (DANBOAT)

DANBOAT has 200 members made up of manufacturers, importers, wholesalers, retailers, brokers, finance and insurance companies.

DANBOAT annually publishes a list of members, and is an organizer of the Copenhagen International Boat Show, Fredericia Boat Show, Kolding Floating Boat Show, and Koege Bugt Floating Boat Show. For more information, write to

Managing Director, DANBOAT
Boersen
DK-1217 Copenhagen K
Denmark
TEL: 01912323
TLX: 19520 chamco
FAX: 01325216

The Royal Danish Consulate General
151 Bloor Street West
Suite 310
Toronto, Ontario
M5S 1S4
TEL: (416) 962-5661
FAX: (416) 962-3668

ADDITIONAL SOURCES OF INFORMATION

Canadian Embassy,
Kr. Bernikowsgade 1
DK 1105 Copenhagen K
Denmark
TEL: (011-45-1) 12-22-99
TLX: (55) 27036 (DMCNC DK)
FAX: (011-45-1) 14-05-85

DENMARK

EXPORTS - 1988

	SAILBOATS		MOTORBOATS	
	Units	Value DKR'000	Units	Value DKR'000
France	41	11,168	-	-
Belgium	3	1,130	-	-
Netherlands	27	6,503	9	3,591
W. Germany	318	73,964	25	15,961
Italy	66	15,469	1	672
U.K.	34	14,028	9	8,094
Ireland	1	511	-	-
Greece	13	11,555	1	933
Portugal	1	350	-	-
Spain	11	3,535	2	1,218
Norway	80	4,830	7	4,774
Sweden	138	10,128	43	9,132
Finland	30	3,472	8	2,976
Switzerland	52	19,177	3	2,242
Austria	4	2,465	2	715
Gibraltar	2	1,138	1	1,120
Malta	1	1,430	-	-
Yugoslavia	35	25,677	3	2,459
U.S.A.	76	4,460	-	-
Canada	3	941	-	-
Greenland	5	1,771	47	11,095
Dominican Rep.	1	4,012	-	-
St. Lucia	4	7,250	-	-
Cyprus	1	547	-	-
Malaysia	1	527	-	-
Japan	19	5,633	4	3,132
Hong Kong	3	993	-	-
Faeroe Is.	-	-	2	352
Total	970	232,664	167	68,466

RATE OF EXCHANGE: 1988 DKR = C$.18

DENMARK

IMPORTS - 1988

	SAILBOATS		MOTORBOATS	
	Units	Value DKR'000	Units	Value DKR'000
France	50	3,863	2	671
Netherlands	3	314	9	3,023
W. Germany	16	3,323	8	1,017
Italy	4	568	3	546
U.K.	799	10,292	33	4,617
Spain	1	1,742	-	-
Ireland	-	-	8	1,527
Norway	41	8,966	89	18,026
Sweden	166	29,772	11	3,987
Finland	13	7,995	21	5,256
Switzerland	2	1,130	-	-
Austria	1	312	-	-
Gibraltar	1	1,000	-	-
Yugoslavia	6	2,021	-	-
U.S.A.	118	1,764	136	16,718
Japan	-	-	24	3,348
Taiwan	-	-	12	12,444
Australia	-	-	1	233
Costa Rica	1	495	-	-
Brasil	2	320	-	-
Total	1,224	73,377	357	81,413

FINLAND - BOATING INDUSTRY AND MARKET

The Finnish Boat and Motor Association FINNBOAT is the industry and trade organization of Finland's boating industry. The Association which is comprised of some 100 firms was formed 27 years ago.

FINNBOAT is a member of the International Council of Marine Industry Associations (ICOMIA).

In 1987, the Finnish boat park was estimated to consist of 17,000 sailboats, 30,000 sailboards, 9,000 inboard and sterndrive motorboats and 479,000 other rigid boats including outboard motorboats.

The FINNBOAT members produced 582 sailboats in 1987, 4623 inboard and sterndrive motorboats and 24,842 other rigid boats including outboard motorboats.

In 1987, 43 FINNBOAT members were boat builders, 9 manufactured accessories and equipment and 36 were in trade and services. Together they employed 2,000 people.

During 1987, 10,855 outboard motors of 325 cc or more and 14,034 of less than 325 cc were delivered to retailers. In In the same year, 1,799 inboard diesel motors and 411 inboard gas motors were delivered.

In 1988, the domestic demand in Finland was very strong. Total sales amounted to FIM 800 million domestic sales were FIM 540 million and imports were FIM 220 million.

Exports in 1988 amounted to 6,000 boats for a value of FIM 350 million. Finland's largest single ;market was Sweden which took 3,500 boats with a value of FIM 80 million.

In 1988, sales of small craft and motorboats grew substantially. The customers wanted quality, multi-purpose, customized products.

RATE OF EXCHANGE: 1988 FIM = C$.29

FINLAND

The demand for habitable motorboats is expected to increase.

Troll-fishing is a rapidly expanding sparetime activity. In 1988, some 2,500 boats participated in fishing competitions.

80% of the imported boats are motorboats.

Finnish sailboats continued to sell well domestically in 1988.

Finland has identified a good potential for sailboats in Japan.

MAJOR BOAT SHOW

SHOW: HELSINKI INT'L BOAT SHOW
New boating season's dealer show

DATE: February
FREQ: Annual
SIZE: 18,260m2

MARKET: International COUNTRIES REPRESENTED: 28

ATTEND: EXHIBITORS: 321 TRADE: Included PUBLIC: 114,432

COST: FIM 170.-237./m2

ORGANIZER: FINNISH FAIR CORP.

CONTACT: Helsinki Fair Centre
Rautatielaisenkatu 3,
POB 21
Helsinki 00520
Finland
TEL: 358 0 150 91
TLX: 358 0 142 358

or

Trade Commission of Finland
1200 Bay Street, Suite 604
Toronto, Ontario
M5R 2A5
TEL: (416) 964-7400
FAX: (416) 964-1524

ADDITIONAL SOURCES OF INFORMATION

Canadian Embassy
Pohjois Esplanadi 25B
00100 Helsinki
Finland
TEL: (011-358-0) 171-141
TLX: (57) 121363 (121363 DMCNH SF)
FAX: (011-358-0) 601-060

FINLAND

IMPORTS BY COUNTRY
JAN - DEC 1988/1987

	1988 Units	1988 Value FIM'000	1987 Units	1987 Value FIM'000
Sweden	746	39,383	754	36,842
W. Germany	181	5,457	237	3,039
Denmark	73	2,732	176	3,438
U.K.	924	23,986	615	11,195
Norway	264	20,144	207	10,331
France	30	7,113	640	8,289
Italy	44	1,730	30	3,485
U.S.A.	1,750	115,414	328	32,570
Spain	4	238	9	865
Netherlands	28	5,594	9	3,929
Ireland	85	5,232	36	2,262
Other	382	3,378	337	3,305
Total	4,511	236,715	3,378	119,550

EXPORTING COUNTRIES BY PERCENTAGE

U.S.A.	49%
Sweden	17%
U.K.	10%
Norway	9%
France	3
Netherlands	2%
W. Germany	2%
Ireland	1%
Denmark	1%
Italy	1%
Others	4%

RATE OF EXCHANGE:	1987	FIM = C$.30
	1988	FIM = C$.29

FINLAND

EXPORTS BY COUNTRY
JAN - DEC 1988/1987

	1988 Units	1988 Value FIM'000	1987 Units	1987 Value FIM'000
Sweden	3,462	75,697	3,328	86,540
W. Germany	583	35,016	856	28,542
Denmark	309	22,362	389	17,426
U.K.	35	28,026	39	37,233
Norway	1,083	20,547	2,134	38,146
France	22	6,850	34	16,338
Italy	8	20,278	23	19,350
U.S.A.	12	31,295	53	38,859
Switzerland	89	12,367	69	6,278
Netherlands	137	4,831	226	8,397
Other	244	38,350	282	56,146
Total	5,984	295,618	7,433	353,253

IMPORTING COUNTRIES BY PERCENTAGE

Sweden	26%
W. Germany	12%
U.S.A.	11%
U.K.	9%
Denmark	8%
Norway	7%
Italy	7%
Switzerland	4%
France	2%
Netherlands	2%
Other	13%

FRANCE - BOATING INDUSTRY & MARKET

France ranks second in the world behind the United States in the construction of pleasure craft. There were 735,000 boats licensed in France in 1988, and more than 2,700,000 people using them (compared with 45,000 in 1966). Within 10 years, the number of windsurfers in use has grown to 450,000.

In spite of the impressive growth, France still has only one boat per 90 inhabitants, compared with one per 15 in the U.S. and Scandinavia. The domestic market has by no means reached the saturation point. France has 150 marinas on its 3,000 km of coastline.

The industry employs 11,000 wage earners, directly in production and a further 17,000 in ancillary activities.

Annual sales of boat builders equalled FF2.3 billion in 1988, a 5.4% increase over 1987. Overall the domestic market registered an increase of 8.8% and the foreign market 13.5%.

Percentage of industry activity:

Sail boats	54%
Motor boats	25%
Inflatable rubber boats	9%
Sailboards	12%

Altogether the boat industry represents FF6 billion of turnover.

France specializes in building world-class sailboats and in manufacturing very high quality fittings. On the other hand, it imports motor boats and most of its marine engines:

Outboards:	49% from Japan
	46% from USA
Inboard gas engines:	57% from USA
	37% from Sweden
Inboard diesel engines:	45% from Japan
	18% from UK
	15% from Sweden

RATE OF EXCHANGE: 1987 FF = C$.22

FRANCE

According to the professionals there is no ideal boat, but the marine industries are continuously improving their already highly advanced techniques, especially in hull construction using composite materials. The ideal boat would be British in comfort, Italian in design (especially motorboats), and French in hull, fittings and speed.

MARKET ACCESS

There are safety and security standards, but no non tariff barriers. For customs duties, see Appendix I.

MAJOR BOAT SHOWS

PARIS "Salon Nautique de Paris", annually in December at Paris Porte de Versailles

2,500 boats, 100,000 m^2 surface area
1,050 exhibitors, 300,000 visitors

Organizer: OIP
62 Rue de Miromesnil
75008 Paris
TEL: 45.62.84.58
TLX: 644-259F
FAX: 45.63.89.82

LA ROCHELLE "Grand Pavois de la Rochelle", annually in September.
300 boats moored, 200 on land
1,500 m of pontoons, 25,000 m^2 of land
450 exhibitors, 70,000 visitors

Organizer: Port des Minimes Digue du Lazaret, 17000 La Rochelle'
TEL: 46.44.46.39
TLX: 791.240F.

FRANCE

CANNES

"Festival de la Plaisance de Cannes" (luxury boats)
Annually in September
150 exhibitors (mainly boats of 12 to 25 m in length)
33,000 visitors

Organizer:
Euroboat Toulon
Ste Sepa
3 Rue de Teheran
75008 Paris
TEL: 42.89.41.04
TLX: 640.369F
FAX: 45.61.12.00

PARIS

SIPEN (marine equipment)
Annually in October
200 exhibitors, 3,900 m^2 surface
2,000 professional visitors from 33 countries

Organizer: SIPEN, Fin, Port de La Bourdonnais
75007 Paris
TEL: 45.55.10.49
TLX: 203.963
FAX: 47.53.94.75

ROUEN

"24 HEURES DE ROUEN", (30 APR-MAY 1/90)

This is the main international motor boat event
C/O Rouen Yacht Club
24 Rue Marie Aroux,
76000 Rouen
TEL: 35.89.36.57
35.71.44.89.

FRANCE

Information about the shows can also be obtained from

Promosalons Canada
1200 Bay Street
Suite 503
Toronto, Ontario
M5A 2A5
TEL: (416) 929-2562
FAX: (416) 929-2564

MAJOR MANUFACTURERS

Chantiers Benneteau
Z.I. Les Mares
85270 St. Hilaire de Riez
TEL: 51.55.53.82
TLX: 711.497
FAX: 51.55.89.10

Jeanneau Voiliers
Av. des Sables
85500 Les Herbiers
TEL: 51.91.06.10
TLX: 711.383
FAX: 51.67.37.65

Kirie Constructions Nautiques
Rte de la Rochelle
85118 Les Sables D'olone
TEL: 51.21.18.83
TLX: 710.852
FAX: 51.21.05.13

Chantiers H. Wauquiez
174 Bd Carnot
59420 Mouvaux
TEL: 20.26.93.59
TLX: 132.830
FAX: 20.70.63.17

Gibert Marine
BP 32
17230 Marans
TEL: 46.68.55.55
TLX: 791.769

FRANCE

ADDITIONAL SOURCES OF INFORMATION

Canadian Embassy, Paris
35, Avenue Montaigne
75008 Paris
France
TEL: (011-33-1) 47-23 01 01
TLX: (42) 280806 (CANAD A 280806F)
FAX: (011-33-1) 47 23 56 28

FRANCE

FRANCE	PRODUCTION		IMPORTS		EXPORTS	
1987	UNITS	VALUE FF '000	UNITS	VALUE FF '000	UNITS	VALUE FF '000
Sailboats	3,537	1,282,000	481	225,194	1,685	672,390
Motor Boats	2,905	404,460	3,731	367,615	335	86,963
Misc. Pleasure Craft - 7,5 m	2,553	25,000			138	1,800
Houseboats	115	34,821			4	1,030
Inflatable boats	89,799	218,313	74,753	184,100	65,811	145,717
Sailboards	106,282	252,261	36,811	52,054	52,247	118,893
Marine Motors						
. Gas			1,298	20,124		
. Diesel			6,379	154,289		
. Outboard			27,144	183,318		
Misc. Equipment						
. Fittings						
. Rope-making						
. Navigational		335,300				
. Instruments						
. Sails						

RATE OF EXCHANGE: 1987 FF = C$.22

GERMANY - BOATING INDUSTRY & MARKET

The boating industry in Germany has changed since the late 1960's. The German Boat Association (DBSV) used to include approximately 175 boat builders among its 350 member-companies. In the late 1980's its 273 member companies (3,300 employees) depended on repair and service for a significant proportion of income. A report on 1987 business reveals the following:

New boat construction	DM 300 mln
Boat repair	DM 140 mln
Boat renovation	DM 80 mln
Total	DM 520 mln

Pleasure boating is big business in Germany. The entire water sports branch of the German leisure industry attained an estimated business volume of DM2.6 billion in 1988. During the year some 3,500 motorboats were sold and the trend to larger boats was maintained. The sailboat market remained stable with turnover of approximately DM425 million. The market for windsurfers, at 50,000 units and DM180 million is half the record year 1981. There appears to be growth in the market for used boats, with a 1988 turnover of DM765 million. Charter companies apparently lead this trend.

The German market for the boating industry (services, charter, trading, marina operation etc.) represents a business volume of some DM2.2 billion and involves some 25,000 employees.

Many of the German boat builders have small operations (20 employees) and have specialized in order to survive against the low wage competition of other countries. Custom work is much more common than serial production and inventories are kept low to guard against adverse shifts in international exchange rates. As in other industries that rely on skilled labour there is a shortage of qualified boat builders in Germany whether working in wood, metal or plastic/fibreglass.

RATE OF EXCHANGE: 1988 DM = C$.70

GERMANY

New boat production in 1987, at DM300 million, was 10% above 1986 and continues the modest increase of recent years. Boat imports have increased substantially in recent years (especially motor boats) and the 1988 import figure (DM248 million for Jan - Sept) should exceed the previous record of DM270 million for 1979.

Germany is a net importer of sailboats and motorboats. There is a significant import market in sailboats and motorboats of a range between 7.5 and 12 metres. Using Jan-Sept statistics for 1988 these sizes account for 66.5% and 51% of the turnover of imported sailboats and motorboats respectively. For sailboats in this class, the major suppliers are Denmark, Netherlands, Sweden and France (together accounting for 57% of total units and 76% of total turnover in this import class). In the 7.5 to 12 metre class of motor boats the top foreign suppliers are the Netherlands, U.S.A., U.K. and Norway (together accounting for 82% of total units and 81% of total turnover in this import class).

ACCESS

All leisure boat imports into Germany are assessed the 14% VAT (The VAT also applies to boats built in Germany). For customs duties, see Appendix I. There are no specific technical barriers to imported boats and their power plant.

There may be marketing considerations relative to servicing and spare parts but there are no specific technical barriers to imported boats & their power plant. The regulatory environment could change with the approach of "Europe 1992" but technical discussions in Brussels about the boat sub-sector have only just begun (it would be surprising to see technical standards that exceed those of France or Italy).

For suppliers of equipment to the boat industry, (electrical and hydraulic systems, gas applicances, etc.) there are approvals required from the Technical Supervisions Association (TUEV) and from the VDE (for electrical equipment). Before proceeding to seek certification of equipment it is recommended to confirm the requirements with potential end-users and any distributors. Testing for a "Konformitatszeichen" (certificate issued in accordance with laws or regulations) or a "Gutezeichen" (certificate not required by law but an often essential marketing step) can be

GERMANY

expensive, time-consuming and result in product alterations. The market potential must justify the cost and effort of certification.

TUEV Rheinland
Attn: Mr. Steve Kramer
480 University Avenue
Toronto, Ontario
Canada
M5G 1V2
TEL: 416-596-7607
TLX: 021-623581

MAJOR BOAT SHOWS

There are three international boating shows in Germany held annually:

BOOT in Dusseldorf is the largest such trade fair, attracting 1,450 exhibitors drawn from 29 countries. The "partner country" for 1989 was Austria. Altogether some 530 foreign exhibitors displayed products at BOOT 89, a foreign participation rate of 36.6%.

Since BOOT is a public trade show it usually attacts more than 400,000 visitors. Daily tickets cost DM15 and a catalogue costs DM10. To participate as an exhibitor in BOOT 91, the application form should be received by NOWEA not later than August 1990. Participation costs vary but a charge of DM135 per square metre (inside, one open front) is an average rental cost. (Construction, utilities, transport, hostesses, etc. are extra).

If the scheduling of BOOT interferes with other marketing activities there are two futher trade fair opportunities in Germany for the boating industry:

HANSEBOOT in Hamburg which will be held from Oct 25-Nov 4, 1990. It usually attracts some 650 exhibitors from 17-19 countries and 135-150,000 visitors.

INTERBOOT which will be held in Friedrichshafen Sept. 22 - 30, 1990. It attracts more than 550 exhibitors from 17 countries and 110,000 - 117,000 visitors.

GERMANY

BOOT is clearly the major show of its kind in Germany. It provides opportunities for Canadian boat builders and equipment suppliers to assess the German and wider European market for this growing industry.

ADDRESSES FOR THE FAIR AUTHORITIES:

BOOT
NOWEA - Duesseldorfer
Messegesellschaft mbH
P.O. Box 32 02 03
D-4000 Dusseldorf 30
TEL: (011-49-211) - 45 60 01
FAX: (011-49-211) - 45 60 668

or

P. R. Charette
5890 Monkland Avenue
Suite 206
Montreal, Quebec
H4A 1G2
TEL: (514) 489-8671
FAX: (514) 487-3230

HANSEBOOT
Hamburg Messe und Congress GmbH
Jungiusstr. 13
D-2000 Hamburg 36
TEL: (011-49-40) - 35 69 0
FAX: (011-49-40) - 35 69 2180

or

Canadian German Chamber of Industry and
Commerce Inc.
1010 Sherbrooke Street West
Suite 1604
Montreal, Quebec
H3A 2R7
TEL: (514) 844-3051
FAX: (514) 844-1473

INTERBOOT
Internationale Bodensee-Messe
Friedrichshafen GmbH
Messegelande
D-7990 Friedrichshafen
TEL: (011-49-7541) - 808 0
FAX: (011-49-7541) - 708 102

GERMANY

ADDITIONAL SOURCES OF INFORMATION

Bundeswirtschaftsvereinigung
Freizeitschiffahrt
(German Boat Dealers Association)
P.O. Box 25 03 70
D-5000 Koeln 1

Canadian Consulate General
Immermann Hof
Immermann Strasse 65D
4000 Dusseldorf 1
Federal Republic of Germany
TEL: (011-49-211) 35 34 71
TLX: (41) 8587144 (DMCN D)
FAX: (011-49-211) 35 91 65

GERMANY

IMPORTS BY TYPE

Type	1988 (Jan-Sept) Units	1988 (Jan-Sept) Value DM '000	1987 (Jan-Sept) Units	1987 (Jan-Sept) Value DM '000	Change in % Units	Change in % Value DM '000
Sailboats over 12 m	49	19,002	67	22,534	-26.9	-15.7
Sailboats 7.5 - 12 m	770	56,350	703	54,442	9.5	3.5
Sailboats under 7.5 m	671	9,348	784	12,174	-14.4	-23.2
Total Sailboats	1,490	84,700	1,554	89,150	-4.1	-5.0
Motorboats over 12 m	27	21,309	22	13,094	22.7	62.7
Motorboats 7.5 - 12 m	752	74,092	546	52,288	37.7	41.7
Motorboats under 7.5 m	1,878	49,846	1,396	38,306	34.5	30.1
Total Motorboats	2,657	14,5247	1,964	103,688	35.3	40.1
Sportboats	8,145	17,966	7,766	13,726	4.9	30.9
Total Boats	12,292	247,913	11,284	206,564	8.9	20.0

Source: Statistisches Bundesamt, Wiesbaden

RATE OF EXCHANGE: 1987 DM = C$.74
1988 DM = C$.70

GERMANY

IMPORTS BY TYPE AND COUNTRY
(JAN - SEPT 1988)

	Sailboats over 12 m		Motorboats over 12 m		Sailboats 7.5 - 12 m		Sailboats under 7.5 m	
Type	Units	Value DM'000	Units	Value DM'000	Units	Value DM'000	Units	Value DM'000
France	11	1,890	1	260	122	9,220	194	2,672
Belgium/ Luxemburg	-	-	1	174	27	1,378	4	1,562
Netherlands	9	6,656	7	12,213	138	4,986	116	1,680
Italy	7	2,528	7	5,901	8	666	28	302
U.K.	6	1,094	3	541	30	3,183	137	1,092
Ireland	-	-	-	-	-	-	2	42
Denmark	3	366	-	-	169	13,818	27	748
Greece	-	-	-	-	-	-	3	12
Norway	1	185	-	-	2	58	8	119
Sweden	2	620	-	-	133	14,861	11	123
Finland	6	4,852	-	-	26	2,734	1	11
Switzerland	-	-	-	-	24	1,437	13	169
Austria	1	170	-	-	63	2,926	7	211
Spain	-	-	1	363	1	62	-	-
U.S.A.	-	-	1	43	4	350	29	271
Canada	-	-	-	-	3	95	-	-
Taiwan	-	-	6	1,814	1	121	-	-
Hong Kong	-	-	-	-	1	22	-	-
Australia	-	-	-	-	1	50	9	71
Other	3	641	-	-	17	383	29	262
Total	49	19,002	27	21,309	770	56,350	671	9,348

GERMANY

IMPORTS BY TYPE AND COUNTRY
(JAN - SEPT 1988)

	Motorboats 7.5 - 12 m		Motorboats under 7.5 m		Sportboats 7.5 - 12 m		Total	
Type	Units	Value DM'000	Units	Value DM'000	Units	Value DM'000	Units	Value DM'000
France	1	90	11	306	199	530	539	14,968
Belgium/ Luxemburg	3	27	4	50	37	120	120	3,228
Netherlands	200	21,292	130	2,315	181	924	781	50,066
Italy	30	1,623	79	2,233	480	901	639	14,154
U.K.	140	15,069	144	3,894	1,136	4,302	1,596	29,175
Ireland	6	252	169	4,803	43	678	220	5,775
Denmark	13	1,884	23	265	369	964	604	18,045
Greece	1	26	10	97	41	246	55	381
Norway	119	10,173	118	4,257	257	411	505	15,203
Sweden	41	6,035	6	167	167	315	360	22,121
Finland	10	1,033	38	801	286	548	367	9,979
Switzerland	5	319	13	464	213	598	268	2,987
Austria	4	377	8	98	1,023	659	1,106	4,441
Spain	3	248	76	1,524	9	87	90	2,284
U.S.A.	160	13,514	979	28,070	1,234	4,122	2,407	46,370
Canada	-	-	2	77	59	41	64	213
Taiwan	14	2,120	-	-	-	-	21	4,055
Hong Kong	-	-	-	-	-	-	1	22
Australia	-	-	-	-	2	10	12	131
Other	2	10	68	425	2,418	2,593	2,537	4,315
Total	752	74,092	1,878	49,346	8,145	17,966	12,292	247,913

GERMANY

TOTAL IMPORTS BY COUNTRY

Type	1988 (Jan-Sept) Units	1988 (Jan-Sept) Value DM'000	1987 (Jan-Sept) Units	1987 (Jan-Sept) Value DM'000	Change in % Units	Change in % Value DM'000
Netherlands	781	50,066	755	31,234	3.4	60.3
U.S.A.	2,407	46,370	1,668	28,649	44.3	61.9
U.K.	1,596	29,175	1,627	28,600	-1.9	2.0
Sweden	360	22,121	396	20,526	-9.1	7.8
Denmark	604	18,045	690	17,225	-12.5	4.8
Norway	505	15,203	524	11,576	-3.6	31.3
France	539	14,968	715	24,021	-24.6	-37.7
Italy	639	14,154	653	13,102	-2.1	8.0
Finland	367	9,979	712	7,834	-48.5	27.4
Ireland	220	5,775	131	3,770	67.9	53.2
Austria	1,106	4,441	817	4,313	35.4	3.0
Taiwan	21	4,055	22	4,270	-4.5	-5.0
Belgium/ Luxemburg	120	3,228	106	3,060	13.2	5.5
Switzerland	268	2,987	147	2,658	82.3	12.4
Spain	90	2,284	133	2,310	-32.3	-1.1
Greece	55	381	72	498	-23.6	-23.5
Canada	64	213	117	457	-45.3	-53.4
Australia	12	131	7	179	71.4	-26.8
Hong Kong	1	22	1	91	-	-75.8
Other	2,537	4,315	1,991	2,191	27.4	96.9
Total	12,292	247,913	11,284	206,564	8.9	20.0

GERMANY

EXPORTS BY TYPE

Type	1988 (Jan-Sept) Units	1988 (Jan-Sept) Value DM '000	1987 (Jan-Sept) Units	1987 (Jan-Sept) Value DM '000	Change in % Units	Change in % Value DM'000
Sailboats over 12 m	26	15,218	28	10,239	-7.1	48.6
Sailboats 7.5 - 12 m	574	55,258	458	45,084	25.3	22.6
Sailboats under 7.5 m	225	3,634	215	3,658	4.7	-.7
Total Sailboats	825	74,110	701	58,981	17.7	25.7
Motorboats over 12 m	17	5,548	15	33,573	13.3	-83.5
Motorboats 7.5 - 12 m	149	23,765	107	14,509	39.3	63.8
Motorboats under 7.5 m	262	8,354	264	7,961	-.8	4.9
Total Boats	428	37,667	386	56,043	10.9	-32.8
Sportboats	5,171	11,221	5,446	9,436	-5.0	18.9
Total Boats	6,424	122,998	6,533	124,460	-1.7	-1.2

Source: Statistisches Bundesamt, Wiesbaden

GERMANY

EXPORTS BY TYPE AND COUNTRY
(JAN - SEPT 1988)

	Sailboats over 12 m		Motorboats over 12 m		Sailboats 7.5 - 12 m		Sailboats under 7.5 m	
Type	Units	Value DM'000	Units	Value DM'000	Units	Value DM'000	Units	Value DM'000
France	1	59	4	1,575	27	5,149	9	221
Belgium/ Luxemburg	-	-	-	-	11	1,096	3	47
Netherlands	3	494	1	510	160	13,029	20	103
Italy	2	916			35	3,339	18	201
U.K.	4	9,066	3	1,353	20	2,435	11	200
Ireland	-	-	-	-	1	34	-	-
Denmark	1	1,350	2	275	12	1,416	2	174
Greece	-	-	1	30	5	727	3	19
Norway	-	-	-	-	-	-	2	67
Sweden	-	-	2	195	5	261	1	29
Finland	-	-	-	-	12	1,157	3	39
Switzerland	-	-	-	-	117	7,864	65	940
Austria	2	235	-	-	31	1,350	47	657
Spain	2	220	1	225	19	2,096	9	81
U.S.A.	1	169	-	-	4	357	6	174
Canada	-	-	-	-	1	130	-	-
Taiwan	-	-	-	-	-	-	-	-
Hong Kong	-	-	-	-	-	-	-	-
Australia					1	84	-	-
Other	10	2,709	3	1,385	113	14,734	26	682
Total	26	15,218	17	5,548	574	55,258	225	3,634

GERMANY

EXPORTS BY TYPE AND COUNTRY
(JAN - SEPT 1988)

	Motorboats 7.5 - 12 m		Motorboats under 7.5 m		Sportboats		Total	
Type	Units	Value DM'000	Units	Value DM'000	Units	Value DM'000	Units	Value DM'000
France	14	2,226	9	423	295	1,107	359	10,760
Belgium/ Luxemburg	1	77	8	169	147	302	170	1,691
Netherlands	10	1,199	17	255	868	1,236	1,079	16,826
Italy	25	4,574	17	798	857	578	954	10,406
U.K.	1	117	4	37	489	815	532	14,023
Ireland	-	-	1	25	-	-	2	59
Denmark	2	190	4	108	91	361	114	3,874
Greece	2	593	6	98	10	101	27	1,568
Norway	1	50	-	-	7	61	10	178
Sweden	-	-	-	-	118	178	126	663
Finland	1	75	-	-	99	95	115	1,366
Switzerland	20	2,006	73	2,368	359	1,147	634	14,325
Austria	7	1,031	23	685	659	773	769	4,731
Spain	24	4,451	41	1,558	42	252	138	8,883
U.S.A.	-	-	-	-	556	1,235	567	1,935
Canada	-	-	-	-	3	21	4	151
Taiwan	-	-	-	-	-	-	-	-
Hong Kong	-	-	-	-	-	-	-	-
Australia	-	-	-	-	2	3	3	87
Other	41	7,176	59	1,830	569	2,956	821	31,472
Total	149	23,765	262	8,354	5,171	11,221	6,424	122,998

GERMANY

TOTAL EXPORTS BY COUNTRY

Type	1988 (Jan-Sept) Units	1988 (Jan-Sept) Value DM'000	1987 (Jan-Sept) Units	1987 (Jan-Sept) Value DM'000	Change in % Units	Change in % Value DM'000
Netherlands	1,079	16,826	1,108	14,245	-2.6	18.1
Switzerland	634	14,325	988	12,704	-35.8	12.8
U.K.	532	14,023	346	4,405	53.8	218.3
France	359	10,760	300	7,967	19.7	35.1
Italy	954	10,406	727	10,975	31.2	-5.2
Spain	138	8,883	100	9,702	38.0	-8.4
Austria	769	4,731	763	4,369	.8	8.3
Denmark	114	3,874	96	3,484	18.8	11.2
U.S.A.	567	1,935	661	19,942	-14.2	-90.3
Belgium/ Luxemburg	170	1,691	311	505	-45.3	234.9
Greece	27	1,568	49	380	-44.9	312.6
Finland	115	1,366	21	621	447.6	120.0
Sweden	126	663	160	1,371	-21.3	-51.6
Norway	10	178	298	1,792	-96.6	90.1
Canada	4	151	59	179	-93.2	-15.6
Australia	3	87	8	84	-62.5	3.6
Ireland	2	59	-	-	-	-
Taiwan	-	-	3	25	-100.0	-100.0
Hong Kong	-	-	27	422	-100.0	-100.0
Other	821	31,472	508	31,288	61.6	.6
Total	6,424	122,998	6,533	124,460	-1.7	-1.2

IRELAND - BOATING INDUSTRY & MARKET

IMPORTS OF PLEASURE BOATS - 1988

	Metric Tons	Value Pound'000
U.K.	608	1,305
Other EEC	126	569
Other	25	103

EXPORTS OF PLEASURE BOATS - 1988

	Metric Tons	Value Pound'000
U.K.	211	1,159
Holland	348	2,246
W. Germany	361	2,670
Spain	93	696
Sweden	120	744
Finland	169	1,317
Austria	77	77
U.S.A.	50	50
Other	287	287

MARKET

With 5630 km of coastline plus inland lakes, sailing has become a popular sport. There are some 120 yacht clubs around the country and an estimated 30,000 enthusiasts. The focus of activity for many is racing and regattas.

A substantial number of second hand yachts are imported from Britain. This is an attractive option owing to the wide choice of craft available and the lower VAT incurred. New vessels bought through an Irish dealer or distributor are subject to a 25% VAT.

RATE OF EXCHANGE: 1988 Irish Pound = C$1.88

IRELAND

MAJOR DEALERS

B. J. Marine Ltd
Sir John Rogersons Quay
Dublin 2
TLX: 719848

O'Sullivan's Marine
Rock Street
Tralee, County Kerry
TLX: 73006

Neil Watson Ltd
2 Connaught Place
Dun Laoghaire, County Dublin

Derg Marine Ltd
Killaloe County Clare
FAX: 061 76205

ADDITIONAL SOURCES OF INFORMATION

Canadian Embassy, Dublin
65/68 St-Stephen's Green
Dublin 2
Ireland
TEL: (011-353-1) 781988
TLX: (500)93803 (93803 DMCN EI)
FAX: (011-353-1) 781285

ITALY - BOATING INDUSTRY & MARKET

This brief outline of the Italian boating industry refers to both outboard and sailing boats.

The sector has about 630 productive units, of which 80% are made up of small artisans and the rest by semi-industrial or industrial type companies.

In 1988 the industry employed 4,600, representing a 4% decrease in respect to 1987. The companies are based mainly in northern and central Italy: Lombardy, Tuscany, Liguria and Lazio. Azimut-Benetti has acquired the sectoral leadership, followed by Cantieri Riva, Cantieri di Pisa and CO. MAR. Between them they control 25% of the market.

The productive evolution of pleasure boats for the 1981-85 period indicates an average annual decrease of 6%. Excluding sailboards, the real time production decreased by 8% during this period. Italian production in 1985 was valued at L.366 billion. The balance of trade was favourable: exports reached L.179 billion compared to imports of L.34 billion.

Demand is growing for inflatable boats and sailboards.

Marketing is very important for the success of this industry. Pricing is decisive for the smaller boats, whereas quality is a major issue for the larger luxury boats. As well as design and finishings, technical support and affordability are important factors.

Medium term prospects seem good; a renewed interest in the sea, and the status symbol of marine vacations are the basis for the development of the pleasure boat industry. Lack of landing sites and the second-hand market are the main threats to the market.

MARKET ACCESS

There are no major technical barriers to the importation of pleasure craft. However, there are safety requirements. For customs duties, see Appendix.

UCINA, the "National Union of Shipbuilders and Nautical Industries", which is associated with Consornautica "Consortium of Nautical Firms", is the principal Italian industry association in the field. It publishes an annual directory of its members and organizes an international nautical fair annually in Genova - SIAS - that attracts exhibitors from throughout the world.

RATE OF EXCHANGE: 1987 Lire = C$.001023

ITALY

UCINA
16129 Genova
P. le J.F. Kennedy
TEL: (010) 589371
TLX: 271248 CONAUT 1
FAX: (010) 5531104

PRINCIPAL IMPORTERS

CHAMPION RECORD SAS
V.B. Longhena, 4
20139 MILANO
TEL: 5397861

UNIVERSAL SPA
Palazzo Esposizioni Morena
V. Michelangelo, 26/28
33019 TRICESIMO (UD)
TEL: (0432) 852082
TLX: 450167 D'ONOFRIO I
450862 D'ONOFRIO I
FAX: (0432) 852082

TRADE FAIRS

SHOW: SIAS '90, Genova
30th Int'l Boat show &
20th Int'l Underwater
Equipment Exhibition

DATE: Oct 13-22 1990
FREQ: Annual
SIZE: 215,000m2

MARKET: International

COUNTRIES REPRESENTED: 23

ATTEND: EXHIBITORS: 1,304

TRADE: 13,600 PUBLIC: 302,747

COST: Upon request

ORGANIZER: FIERA DI GENOVA

CONTACT: Secretary General
P. le J.F. Kennedy
16129 Genova
Italy
TEL: 0039 010 53 911
FAX: 010 539 1270

ITALY

ADDITIONAL SOURCES OF INFORMATION

Canadian Embassy
Via G.B. de Rossi 27
00161 Rome
Italy
TEL: (011-39-6) 855-341
TLX: (43) 610056 (DOMCAN 1)
FAX: (011-39-6) 884-8752

ITALY

EXPORTS

INFLATABLE BOATS (under 20 kg and less than 2.5 m)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	2,403	441,757	454	73,055
Belgium/Luxemburg	134	3,346	-	-
Netherlands	55	2,180	12	5,800
W. Germany	3,493	824,222	454	30,565
Greece	361	73,207	-	-
Turkey	3	1,850	-	-
Uganda	2	3,004	-	-
U.S.A.	3,636	425,320	-	-
Canada	123	6,400	-	-
Switzerland	-	-	997	79,721
Austria	-	-	318	25,427
TOTAL	10,210	1,781,286	2,235	214,568

ITALY

EXPORTS

INFLATABLE BOATS (20 - 100 kg)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	1,522	356,879	2,059	626,830
Belgium/Luxemburg	18	4,182	-	-
Netherlands	808	211,580	211	125,815
W. Germany	567	169,210	438	304,284
U.K.	13	1,950	11	6,800
Denmark	4	1,830	-	-
Greece	1,301	377,712	812	426,776
Spain	277	63,754	53	38,039
Norway	607	69,702	19	1,104
Sweden	320	87,794	88	23,054
Switzerland	1,555	203,225	1,037	164,678
Austria	629	188,302	166	60,305
Yugoslavia	11	4,895	5	12,940
Hungary	130	55,200	-	-
Bulgaria	9	3,000	-	-
Sudan	22	9,980	-	-
Ivory Coast	8	3,920	-	-
Ethiopia	4	3,000	-	-
Djibouti	4	4,422	-	-
Kenya	31	15,612	-	-
U.S.A.	780	229,770	390	104,500
Costa Rica	7	4,360	-	-
Brazil	6	5,428	-	-
Chile	7	2,000	-	-
Maldive Is.	6	2,000	-	-
Thailand	24	7,940	-	-
Malaysia	3	1,200	-	-
Australia	7	2,630	-	-
Polar Regions	4	1,000	-	-
Portugal	-	-	8	10,949
Canary Is.	-	-	44	10,500
Malta	-	-	17	6,354
Turkey	-	-	140	20,733
Tunisia	-	-	1	8,675
Libya	-	-	10	28,300
Scychelles	-	-	2	5,265
Other	15	7,366	-	-
TOTAL	8,699	2,099,843	5,511	1,985,901

ITALY

EXPORTS

INFLATABLE BOATS (over 100 kg)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	11,966	2,849,720	13,034	3,297,133
Belgium/Luxemburg	102	36,660	37	15,870
Netherlands	531	175,424	165	73,707
W. Germany	13,744	630,704	867	411,973
U.K.	11	9,803	1	98,782
Denmark	15	5,242	-	-
Greece	1241	313,030	1,704	529,414
Spain	678	143,114	1,041	162,334
Canary Is.	72	4,000	-	-
Norway	29	7,773	-	-
Sweden	632	222,589	584	264,034
Finland	12	26,338	119	27,879
Switzerland	2,226	473,429	490	518,062
Austria	663	123,032	59	32,607
Yugoslavia	8	1,230	7	4,330
Turkey	13	1,360	13	8,224
Czechoslovakia	21	2,321	-	-
Hungary	160	61,390	124	13,064
Tunisia	27	13,626	33	8,179
Egypt	13	2,870	38	9,200
Mali	10	6,030	-	-
Cape Verde Is.	1,235	204,779	-	-
Senegal	25	6,850	-	-
Guinea-Bissau	63	13,470	-	-
Liberia	318	70,000	-	-
Ivory Coast	8	4,375	-	-
Nigeria	15	7,174	-	-
Kenya	45	9,000	-	-
South Africa	17	1,455	-	-
U.S.A.	2,082	603,384	2,556	493,679
Mexico	27	9,471	-	-
Panama	34	14,911	-	-
Netherlands Antilles	10	4,498	1	1,500
Bahamas	50	9,200	-	-
Cyprus	22	3,200	-	-
Maldive Is.	47	6,743	-	-
Japan	272	123,978	53	20,812
Australia	36	12,266	3	14,000
New Guinea	18	1,000	-	-
New Zealand	34	10,353	-	-
Polar Regions	15	5,200	-	-
Portugal	-	-	90	11,113
Gibraltar	-	-	1	480,000
E. Germany	-	-	3	2,849

ITALY

EXPORTS

INFLATABLE BOATS (over 100 kg) - continued

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
Angola	-	-	1	9,150
Canada	-	-	25	6,130
Guatemala	-	-	1	6,370
Bolivia	-	-	1	10,646
Saudi Arabia	-	-	45	10,086
Taiwan	-	-	33	12,602
French Polynesia	-	-	50	10,950
Other	18	2,677	36	19,229
TOTAL	36,565	6,233,669	21,215	6,583,908

SAILBOATS (seagoing)

France	19	62,234	99	1,607,352
Netherlands	5	48,249	14	132,804
W. Germany	283	2,304,900	8	145,707
U.K.	152	1,440,535	60	1,316,194
Denmark	11	70,000	-	-
Greece	44	422,029	13	96,000
Spain	40	88,793	5	407,670
Canary Is.	1	8,165	-	-
Norway	22	157,974	2	461,696
Sweden	4	256,798	19	289,928
Finland	36	619,781	-	-
Switzerland	26	271,723	22	831,166
Austria	43	494,520	2	472,994
Hungary	1	4,960	-	-
U.S.A.	183	1,201,660	1	76,425
Cyprus	25	170,000	8	2,641,866
Israel	15	48,500	-	-
Japan	1	4,100	4	28,000
Australia	9	47,162	-	-
Portugal	-	-	1	8,661
Yugoslavia	-	-	1	4,000
TOTAL	920	7,732,083	259	8,520,463

ITALY

EXPORTS

SAILBOATS (under 100 kg)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	41	48,719	48	134,325
Belgium/Luxemburg	23	57,172	49	65,165
W. Germany	193	197,705	174	232,792
U.K.	436	649,500	8	7,963
Portugal	1	1,300	-	-
Spain	226	458,585	19	92,450
Canary Is.	3	9,944	-	-
Finland	1	1,220	-	-
Switzerland	41	33,088	-	-
Austria	1	3,600	-	-
Yugoslavia	6	17,937	7	21,800
Tunisia	21	33,383	-	-
Guinea-Bissau	5	2,694	-	-
Japan	1	3,200	1	4,085
Australia	3	4,529	-	-
Denmark	-	-	1	3,400
Greece	-	-	17	14,724
Turkey	-	-	3	3,202
Libya	-	-	1	2,300
U.S.A.	-	-	10	28,874
TOTAL	1,002	1,522,576	338	611,080

ITALY

EXPORTS

SAILBOATS (over 100 kg, less than 7.5 m)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	117	294,497	34	176,343
Belgium/Luxemburg	27	127,629	19	66,215
W. Germany	160	450,243	20	138,944
U.K.	36	72,986	4	13,350
Denmark	9	29,900	2	14,000
Greece	14	52,750	-	-
Portugal	2	12,000	-	-
Spain	106	615,025	9	48,550
Sweden	28	87,817	1	1,950
Finland	14	25,059	-	-
Switzerland	138	258,040	31	123,476
Austria	14	30,600	34	42,409
Yugoslavia	1	3,050	3	9,650
Hungary	2	9,900	-	-
Gabon	1	3,766	-	-
Somalia	2	4,800	-	-
U.S.A.	10	44,759	13	31,523
Canada	1	5,600	-	-
Brazil	6	2,660	19	66,000
Japan	2	2,160	-	-
Netherlands	-	-	6	15,380
Gambia	-	-	1	3,300
Israel	-	-	1	1,800
Maldive Is.	-	-	2	9,450
TOTAL	690	2,133,241	199	762,340

ITALY

EXPORTS

SAILBOATS (over 100 kg, more than 7.5 m)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	19	633,319	9	345,999
Netherlands	9	262,583	2	147,893
W. Germany	40	1,319,245	17	976,749
U.K.	25	1,179,145	2	97,062
Denmark	1	40,000	-	-
Greece	11	289,763	2	184,000
Spain	9	258,353	-	-
Norway	4	233,358	-	-
Sweden	2	15,700	-	-
Finland	4	204,593	-	-
Switzerland	31	706,356	3	240,340
Austria	25	910,302	1	15,000
Yugoslavia	1	1,761	-	-
Turkey	15	668,475	-	-
Poland	1	1,379	-	-
U.S.A.	5	150,000	-	-
Japan	12	467,377	-	-
Malta	-	-	7	13,000
Nigeria	-	-	1	17,000
Singapore	-	-	1	6,572
Taiwan	-	-	2	46,553
TOTAL	214	7,341,709	47	2,090,168

ITALY

EXPORTS

MOTORBOATS (seagoing)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	119	8,622,892	58	14,153,358
Belgium/Luxemburg	24	3,037,648	10	4,869,189
Netherlands	12	20,100	-	-
Germany	72	7,310,404	67	2,721,705
U.K.	1,165	55,906,996	306	45,198,253
Denmark	26	4,108,478	7	534,431
Greece	35	2,179,322	-	-
Spain	11	1,089,679	4	1,946,649
Switzerland	539	13,107,953	51	2,977,943
Austria	28	3,880,000	21	1,911,524
Gibraltar	62	5,671,252	-	-
Malta	115	7,350,000	1	1,091,018
Yugoslavia	54	1,934,167	10	1,407,334
Turkey	10	1,829,544	-	-
Guinea-Bissau	4	765,000	-	-
Liberia	61	9,302,456	1	350,000
Mozambique	1	9,346	-	-
U.S.A.	411	9,623,560	64	9,221,987
Canada	23	2,469,028	2	1,344,796
Cyprus	13	1,343,227	-	-
Kuwait	37	5,835,527	-	-
Bahrain	15	2,157,600	-	-
Sri Lanka	4	177,000	-	-
Singapore	13	1,350,000	-	-
Japan	195	11,462,520	20	6,406,636
Hong Kong	21	1,840,000	4	6,276,123
Portugal	-	-	7	540,900
Sweden	-	-	7	1,326,970
Finland	-	-	3	1,673,000
Sierra Leone	-	-	1	39,145
Panama	-	-	31	4,985,000
Bolivia	-	-	1	2,100,000
Other	-	-	1	2,124,721
TOTAL	3,070	162,383,699	677	113,200,682

ITALY

EXPORTS

MOTORBOATS (under 7.5 m)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	1,260	2,102,819	200	548,635
Belgium/Luxemburg	46	92,712	1	230,000
W. Germany	1,030	2,488,250	324	1,300,287
U.K.	46	160,633	22	377,620
Denmark	52	104,522	-	-
Greece	115	188,241	-	-
Portugal	81	174,783	47	187,040
Spain	560	1,221,220	141	700,403
Canary Is.	1	69,923	-	-
Norway	65	331,593	-	-
Sweden	100	131,215	102	95,575
Finland	71	125,561	20	195,501
Switzerland	2,061	4,753,615	436	3,559,545
Austria	79	206,736	51	167,778
Tunisia	7	28,690	-	-
Libya	3	6,160	-	-
Mauritania	28	56,633	-	-
Tanzania	35	2,000	-	-
Seychelles	12	47,000	-	-
Panama	10	24,000	-	-
Japan	7	33,726	-	-
Netherlands	-	-	39	85,122
Andora	-	-	1	174,184
U.S.A.	-	-	2	55,808
Canada	-	-	1	5,650
Netherlands Antilles	-	-	2	3,600
Other	1	8,200	-	-
TOTAL	5,670	12,358,232	1,389	7,686,748

ITALY

EXPORTS

MOTORBOATS (over 7.5 m, not sea going)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	127	8,644,171	97	10,077,933
Belgium/Luxemburg	6	522,205	-	-
W. Germany	63	3,578,013	62	3,256,200
U.K.	55	4,492,890	6	905,400
Denmark	4	410,378	1	133,000
Greece	2	8,100	13	484,971
Spain	36	2,537,381	7	761,393
Norway	3	158,000	1	202,300
Switzerland	58	3,265,794	43	3,394,291
Austria	54	4,363,373	1	120,332
Gibraltar	5	457,200	2	722,470
Mali	18	784,346	-	-
Yugoslavia	22	926,722	3	28,500
Turkey	1	266,010	2	456,320
Morocco	4	530,000	-	-
Senegal	4	200,000	-	-
Guinea	2	617,000	-	-
Tanzania	3	18,000	-	-
U.S.A.	121	4,931,077	3	469,627
Canada	1	70,000	-	-
Bermuda	25	2,268,000	-	-
Panama	6	510,000	-	-
Anguilla	5	479,863	-	-
Cyprus	6	360,000	-	-
Saudi Arabia	4	304,000	-	-
Quatar	5	464,169	1	31,179
Japan	2	128,170	1	150,450
Portugal	-	-	1	76,370
Sweden	-	-	1	65,000
Finland	-	-	11	641,254
E. Germany	-	-	1	290,645
Reunion	-	-	1	74,742
Lebanon	-	-	3	62,529
Kuwait	-	-	2	435,296
Hong Kong	-	-	2	533,000
Australia	-	-	1	7,450
Other	-	-	2	11,610
TOTAL	642	41,294,862	268	23,392,262

ITALY

EXPORTS

OTHER PLEASURE CRAFT (under 100 kg)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	358	542,991	150	246,553
Belgium/Luxemburg	3	4,469	6	62,200
Netherlands	3	9,100	1	2,500
W. Germany	305	553,786	165	220,505
U.K.	6	28,845	15	47,556
Greece	18	36,600	39	88,969
Portugal	15	6,181	7	12,328
Spain	318	307,360	65	166,521
Norway	2	12,996	2	10,950
Sweden	2	5,046	12	23,850
Switzerland	93	192,091	122	143,633
Austria	78	69,701	101	165,404
Gibraltar	1	10,500	24	16,557
Malta	2	1,200	-	-
Yugoslavia	26	48,285	17	84,017
Turkey	1	1,875	-	-
Albania	52	65,350	-	-
Tunisia	2	30,957	-	-
Seychelles	1	2,849	-	-
U.S.A.	204	281,200	1	7,450
Grenada	1	3,200	-	-
Israel	2	24,430	-	-
Saudi Arabia	18	22,500	-	-
South Korea	17	3,000	1	1,728
Finland	-	-	9	38,783
Libya	-	-	1	2,185
Kuwait	-	-	10	26,916
Japan	-	-	1	11,616
TOTAL	1,528	2,264,512	749	1,380,221

ITALY

EXPORTS **OTHER PLEASURE CRAFT (over 100 kg, less than 7.5 m)**

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	624	1,444,862	251	678,576
Belgium/Luxemburg	17	61,580	1	7,104
Netherlands	13	17,468	61	225,889
W. Germany	310	758,165	147	457,373
U.K.	36	101,933	145	185,396
Denmark	22	54,539	-	-
Greece	185	197,962	49	196,434
Spain	521	1,199,227	373	1,364,316
Norway	38	105,913	2	30,651
Sweden	94	138,691	30	37,835
Finland	45	140,061	-	-
Switzerland	184	508,821	72	261,946
Austria	186	354,069	81	113,995
Vatican	1	1,351	-	-
Malta	4	8,785	-	-
Yugoslavia	60	190,629	47	160,789
Algeria	10	20,200	-	-
Egypt	7	15,750	-	-
Guinea-Bissau	9	26,940	-	-
Nigeria	5	28,090	-	-
Kenya	4	16,000	-	-
Seychelles	1	11,021	-	-
South Africa	1	7,045	-	-
U.S.A.	121	240,479	127	352,715
Canada	3	17,773	-	-
Panama	1	7,000	-	-
Peru	4	9,836	-	-
Brazil	22	81,121	1	2,670
Lebanon	7	18,000	1	19,000
Saudi Arabia	17	46,543	-	-
Quatar	1	2,608	-	-
United Arab Emirates	5	16,680	-	-
Maldive Is.	1	2,349	-	-
Sri Lanka	1	1,400	-	-
Japan	8	22,660	1	2,100
Taiwan	2	14,935	-	-
Hong Kong	5	13,000	-	-
Polar Regions	1	2,000	-	-
Turkey	-	-	3	5,720
Libya	-	-	31	135,600
Sudan	-	-	1	6,207
Senegal	-	-	6	15,375

ITALY

EXPORT

OTHER PLEASURE CRAFT (over 100 kg, less than 7.5 m) - continued

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
Reunion	-	-	2	2,000
Mexico	-	-	12	37,124
Cuba	-	-	1	9,500
India	-	-	2	2,000
Malaysia	-	-	1	2,100
Other	-	-	1	13,946
TOTAL	2,576	5,905,486	1,455	4,394,118

ITALY

EXPORTS

OTHER PLEASURE CRAFT (over 100 kg, more than 7.5 m)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	72	1,939,946	35	1,392,592
Belgium/Luxemburg	6	27,158	2	30,250
Netherlands	3	264,371	12	22,815
W. Germany	13	553,941	16	554,534
U.K.	23	895,024	17	1,282,225
Denmark	6	60,249	6	36,072
Greece	12	225,266	5	272,139
Portugal	1	18,000	1	17,400
Spain	19	1,064,103	24	1,371,108
Ireland	5	438,000	-	-
Norway	2	8,200	-	-
Sweden	4	24,600	1	19,965
Finland	9	45,676	3	404,839
Switzerland	42	813,442	57	428,127
Austria	20	403,780	5	1,214,407
Malta	4	40,520	2	24,250
Yugoslavia	3	20,767	1	10,000
Mauritania	7	171,962	-	-
Cape Verde Is.	6	128,437	-	-
Senegal	4	184,462	-	-
U.S.A.	196	10,105,879	1	20,000
Peru	1	35,600	-	-
Uruguay	1	17,750	-	-
Argentina	2	36,000	-	-
Japan	4	62,835	9	119,079
Liberia	-	-	6	154,595
South Africa	-	-	1	6,855
Canada	-	-	1	5,000
Kuwait	-	-	2	8,581
Other	2	14,372	-	-
TOTAL	467	17,600,340	207	7,394,833

ITALY

IMPORTS

INFLATABLE BOATS (under 20 kg, less than 2.5 m)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	34	2,600	-	-
Netherlands	284	5,060	100	6,522
W. Germany	646	32,993	2,496	38,519
Switzerland	80	4,100	208	7,800
Malta	135	11,588	-	-
E. Germany	114	10,000	-	-
Czechoslovakia	320	36,850	825	93,411
Thailand	65	15,940	-	-
Japan	639	49,135	-	-
Taiwan	5,865	234,050	517	15,077
Hong Kong	12	2,510	-	-
U.K.	-	-	33	13,324
Austria	-	-	10	4,332
S. Korea	-	-	20,965	326,599
TOTAL	8,196	404,826	25,154	505,584

INFLATABLE BOATS (20-100kg)

France	14,679	3,118,473	1,427	2,331,495
Belgium/Luxemburg	8	2,408	-	-
W. Germany	164	36,879	2	7,207
U.K.	264	69,155	26	211,965
Greece	163	19,440	1	1,270
Norway	18	7,855	-	-
Sweden	13	5,332	-	-
Switzerland	14	10,740	3	16,000
Austria	18	6,050	1	5,466
Yugoslavia	605	64,416	252	188,291
E. Germany	114	9,604	35	9,452
U.S.A.	548	144,325	16	13,888
Argentina	24	8,881	-	-
S. Korea	451	41,213	2,354	95,598
Taiwan	9,676	218,086	1,686	62,680
Spain	-	-	24	29,260
Czechoslovakia	-	-	13	1,527
Japan	-	-	2	1,488
Other	5	4,338	1	2,500
TOTAL	26,764	3,767,200	5,843	2,978,087

ITALY

IMPORTS

INFLATABLE BOATS (over 100 kg)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	3,589	935,996	258	1,120,259
Belgium/Luxemburg	4	4,278	-	-
Netherlands	20	9,518	-	-
W. Germany	1,460	424,257	139	130,622
U.K.	228	107,601	24	7,057
Denmark	12	3,895	2	13,759
Greece	940	88,404	27	1,500
Spain	107	37,816	31	36,591
Switzerland	111	6,888	1	2,598
Austria	14	7,368	10	25,554
Yugoslavia	14	2,500	-	-
U.S.A.	701	113,874	1	2,987
Other	320	2,200	-	-
TOTAL	7,520	1,744,595	493	1,340,927

SAILBOATS (seagoing)

France	209	2,254,505	12	854,176
W. Germany	18	47,145	2	135,583
U.K.	163	786,820	15	699,006
Denmark	32	377,649	2	254,346
Greece	13	35,270	-	-
Sweden	12	132,290	3	773,434
Finland	198	1,811,177	4	1,218,446
Switzerland	1	4,000	-	-
South Africa	32	169,250	-	-
U.S.A.	28	115,563	1	593,571
Canada	33	112,485	-	-
Chile	-	-	1	47,000
Panama	-	-	1	131,142
TOTAL	739	5,846,154	41	4,706,704

ITALY

IMPORTS

SAILBOATS (under 100 kg)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	69	82,581	21	63,767
W. Germany	1	1,473	-	-
U.K.	569	1,007,344	367	751,470
Denmark	29	56,859	42	73,124
Greece	2	1,565	-	-
Philippines	12	6,244	-	-
Switzerland	-	-	3	2,985
Argentina	-	-	30	41,400
Quatar	-	-	1	3,299
TOTAL	682	1,156,065	464	936,045

SAILBOATS (over 100 kg, less than 7.5m)

France	419	1,089,406	89	2,691,392
Belgium/Luxemburg	5	2,360	-	-
Netherlands	3	25,942	-	-
W. Germany	198	382,149	8	143,349
U.K.	169	424,987	27	136,332
Denmark	35	93,389	-	-
Greece	13	15,936	13	30,843
Sweden	1	19,931	1	22,105
Malta	7	6,900	-	-
Swaziland	6	2,678	-	-
U.S.A.	293	192,133	-	-
Australia	28	6,794	-	-
Switzerland	-	-	1	60,000
Yugoslavia	-	-	1	10,360
TOTAL	1,177	2,262,605	140	3,094,381

ITALY

IMPORTS

SAILBOATS (over 100 kg, more than 7.5 m)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	123	4,371,701	72	6,010,065
W. Germany	120	1,981,638	38	2,764,567
U.K.	33	731,264	3	470,783
Denmark	18	938,621	14	1,432,603
Sweden	34	1,426,927	9	1,291,756
Finland	8	445,590	1	195,613
Austria	1	32,915	1	55,000
Malta	8	417,552	1	108,000
Yugoslavia	3	69,410	4	189,169
U.S.A.	6	245,579	2	20,000
Canada	2	42,646	-	-
Panama	14	132,200	-	-
New Zealand	3	163,366	-	-
Netherlands	-	-	3	82,256
Sweden	-	-	1	4,000
Turkey	-	-	1	42,000
Argentina	-	-	1	300,000
Cyprus	-	-	2	41,000
Australia	-	-	1	144,892
TOTAL	373	11,043,409	154	13,151,704

ITALY

IMPORTS

MOTORBOATS (seagoing)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	12	828,573	3	285,427
Netherlands	7	131,782	3	68,784
W. Germany	12	134,500	-	-
U.K.	119	2,936,597	10	4,344,039
Ireland	15	303,403	19	734,557
Greece	1	3,000	-	-
Sweden	9	534,212	-	-
Malta	14	630,000	-	-
Liberia	19	300,000	-	-
U.S.A.	130	9,209,952	22	2,793,531
Canada	11	190,000	-	-
Panama	24	850,000	1	3,000
Anguilla	12	500,000	-	-
Bolivia	21	1,050,000	-	-
Argentina	1	40,000	-	-
Singapore	6	295,365	1	285,922
Taiwan	44	1,222,052	1	192,678
Other	2	6,000	-	-
Spain	-	-	2	484,500
Switzerland	-	-	2	55,000
Grenada	-	-	1	54,000
TOTAL	459	19,165,436	65	9,301,438

ITALY

IMPORTS

MOTORBOATS (under 7.5 m)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	191	250,041	13	276,641
Belgium/Luxemburg	406	649,651	77	2,103,487
Netherlands	512	805,829	1	4,679
W. Germany	70	94,930	13	91,238
U.K.	166	352,904	31	511,989
Ireland	151	248,222	2	38,643
Denmark	2	4,539	-	-
Greece	62	111,325	2	90,890
Spain	1,164	2,233,735	60	1,191,387
Faeroe Is.	16	35,523	-	-
Norway	314	675,138	2	73,685
Switzerland	63	66,141	13	13,977
Austria	8	19,500	1	70,000
Malta	72	137,365	-	-
Yugoslavia	88	60,918	6	18,128
U.S.A.	3,421	4,614,678	350	3,813,677
Singapore	12	6,000	-	-
Japan	42	172,845	1	2,090
Sweden	-	-	1	6,800
Other	30	3,000	-	-
TOTAL	6,750	10,542,284	573	8,307,311

ITALY

IMPORTS

MOTORBOATS (over 7.5 m, not seagoing)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	49	1,978,373	11	1,006,639
Netherlands	2	74,772	-	-
W. Germany	85	927,732	14	693,460
U.K.	70	2,818,042	18	1,400,987
Denmark	7	184,185	-	-
Greece	1	75,646	1	41,114
Spain	26	1,471,774	21	1,091,386
Norway	6	148,566	4	372,830
Sweden	4	234,449	5	589,496
Switzerland	7	89,323	2	73,000
Austria	8	431,800	8	200,000
Malta	9	454,500	-	-
Yugoslavia	4	234,950	-	-
Turkey	8	19,222	-	-
U.S.A.	335	15,261,654	144	10,960,608
Panama	7	35,000	-	-
Bahamas	2	27,281	-	-
United Arab Emirates	1	32,860	-	-
Singapore	3	22,000	2	537,074
Taiwan	4	125,543	2	206,752
Australia	1	27,917	1	176,434
Ireland	-	-	1	30,000
Other	3	60,721	1	104,057
TOTAL	642	24,736,310	235	17,483,837

ITALY

IMPORTS

OTHER PLEASURE CRAFT (under 100 kg)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	206	98,871	301	204,760
W. Germany	405	477,878	232	15,099
U.K.	469	487,973	660	231,980
Denmark	10	38,570	8	29,748
Yugoslavia	23	18,967	15	8,456
E. Germany	44	19,320	65	16,891
Czechoslovakia	38	8,199	-	-
U.S.A.	29	46,213	13	16,098
Canada	1,552	708,416	450	253,876
Japan	7	12,908	-	-
Taiwan	4	1,551	208	78,430
Australia	1	6,210	-	-
New Zealand	1	10,642	-	-
Belgium-Luxemburg	-	-	5	7,357
Greece	-	-	18	46,328
Switzerland	-	-	10	12,960
Hungary	-	-	8	5,700
Singapore	-	-	1	4,359
TOTAL	2,789	1,935,718	1,994	932,042

ITALY

IMPORTS

OTHER PLEASURE CRAFT (over 100 kg, less than 7.5 m)

	1988		1989 (Jan-June)	
	Units	Value L'000	Units	Value L'000
France	66	184,672	68	411,137
Belgium/Luxemburg	52	76,698	1	6,284
Netherlands	271	584,073	420	1,168,278
W. Germany	64	320,731	13	90,553
U.K.	103	239,416	21	198,565
Denmark	3	12,236	-	-
Greece	628	731,356	372	1,214,484
Spain	137	271,039	12	259,110
Norway	25	66,274	-	-
Switzerland	70	56,453	2	15,394
Austria	1	1,394	10	4,500
Malta	10	6,900	-	-
Yugoslavia	1,430	1,683,678	334	910,602
Turkey	7	11,000	-	-
Poland	112	61,898	-	-
South Africa	16	5,000	-	-
U.S.A.	2,255	4,499,345	254	3,738,268
Canada	9	11,477	-	-
Japan	3	11,161	-	-
Sweden	-	-	1	1,209
Other	2	5,000	-	-
TOTAL	5,264	8,839,801	1,508	8,018,384

OTHER PLEASURE CRAFT (over 100 kg, more than 7.5 m)

France	14	304,579	4	190,747
W. Germany	12	151,860	9,754	64,062
U.K.	16	647,190	6	360,718
Spain	2	10,020	2	80,000
Norway	10	779,464	9	874,194
Sweden	12	575,114	3	900,917
Switzerland	5	298,287	2	148,368
Yugoslavia	4	67,775	2	27,184
U.S.A.	82	2,890,080	31	1,415,006
Hong Kong	1	24,323	-	-
Greece	-	-	22	92,074
Other	2	51,000	-	-
TOTAL	160	5,799,692	9,835	4,153,270

SWEDEN - BOATING INDUSTRY & MARKET

The market for pleasure boats in Sweden has been expanding rapidly in recent years, with the number of boats purchased in the 1990 season expected to reach 25,000 (compared to 15,000 in 1986). Powerboats have constituted the fastest growing market segment as a new market has opened up, i.e., buyers with little background in sailing and who want a boat that is as easy to drive as a car. The rate of growth in the 1990s, however, is expected to be much lower, as tax reform and other changes leave buyers uncertain as to the level of their disposable income. Nevertheless, the size of the import market will remain high, around $100 - $125 million per year.

Statistics for 1988 indicate that sales in Sweden totalled SKR1090 million (approx C $200 million), of which SKR624 million was accounted for by imports. The largest sources of imports in value terms were the U.S.A. (SKR194 million), Finland and Norway (SKR110 million each). U.S.A. has achieved extraordinary growth in sales, from SKR1 million in 1985 to SKR78 million in 1987 to SKR194 million in 1988. Three factors account for this: the fall in the dollar which has made U.S. manufacturers competitive, a preference for the newer and sportier designs of American boats compared to European ones (especially powerboats), and the preference for powerboats (16 feet and up) among new buyers (most American sales are of powerboats). Sales from the U.K. have also increased rapidly, from SKR9 million in 1984 to SKR54 million in 1988. U.K. success has primarily been in the area of motorboats of 30 feet and up (power cruisers rather than speed boats).

Statistics on the category of boats are only available in unit terms. In 1988, 377 sailboats were imported out of 800 sold in Sweden, showing a steady drop in sales since 1980; 6,114 motorboats were imported out of 14,820 sold; and 7,709 rowboats and canoes were imported out of 9,130 sold. Sailboard imports have been dropping since 1983, from 32,824 units to 3,944. The dominant market segment in both unit and value terms in the 1990s will remain powerboats.

RATE OF EXCHANGE:	1987	SKr = C$.21
	1988	SKr = C$.20

SWEDEN

The industry's various trade associations are grouped in SWEBOAT, the Federation of Swedish Boating Industries. The member associations include: The Association of Swedish Boating Industries (mainly boatbuilders - 18 members), the Association of Swedish Marine Engine Manufacturers and Importers (10 members), the Association of Swedish Marine Wholesalers and Importers (22 members) and the Association of Swedish Marine Dealers (145 members). SWEBOAT's address is:

Sweboat-Baatbranschens Riksfoerburn
Ljusstoeparbacken 20
S-117 45 Stockholm
TEL: 08-744 02 20
FAX: 08-744 09 06.
ATTN: Bjoern Lagerkvist.

MARKET ACCESS

There are no significant non tariff barriers. For customs duties, see Appendix.

MARKET ASSESSMENT

Export potential exists in the powerboat sector. This is reinforced by the recent interest expressed by a local importer in Canadian manufactured powerboats. The market for accessories is considerable in this leisure and boat-oriented country.

MAJOR BOAT SHOWS

SHOW: STOCKHOLM INT'L FLOATING BOAT SHOW
New motor, sailing & small boats; marine engines & accessories
DATE: Sept 5-9 1990
FREQ: Annual
SIZE: 2,600m2

MARKET: International
COUNTRIES REPRESENTED: 5

ATTEND: EXHIBITORS: 150 TRADE: Included PUBLIC: 30,000

COST: SKR 300.-325./m2

ORGANIZER: SWEBOAT

CONTACT: Fair Organiser
Ljusstoparbacken 20
Stockholm 11745
Sweden
TEL: 08 744 02 20
FAX: 08 744 1829

SWEDEN

SHOW: INT'L BOAT SHOW, Gothenburg
Marine & pleasure boats
& accessoires

DATE: February
FREQ: Annual
SIZE: 11,322m^2

MARKET: International

COUNTRIES REPRESENTED: 19

ATTEND: EXHIBITORS: 252 TRADE: Included PUBLIC: 97,699

COST: Upon request

ORGANIZER: SWEBOAT

CONTACT: Fair Organizer
Ljusstoparbacken 20
Stockholm 11745
Sweden
TEL: 08 744 02 20
FAX: 08 744 1829

ADDITIONAL SOURCES OF INFORMATION

Canadian Embassy
Tegelbacken 4, 7th floor
P.O. Box 16129
S-103 23 Stockholm
Sweden
TEL: (011-46-8) 23 79 20
TLX: (54) 106 87 (20687 DOMCAN S)
FAX: (011-46-8) 24 24 91

SWITZERLAND - BOATING INDUSTRY & MARKET

The major obstacle for expanding this market is the lack of boat mooring facilities in Swiss lakes and rivers. There is a waiting list for such mooring places at every Swiss lake/river marina. Expansion of such facilities is not wanted for political reasons and by environmental protectionists.

Every boat exceeding 2.5 meters in length must be registered. Today, there are some 109,000 boats registered and this number increases by only about 1.7% per annum. About a dozen Swiss boat manufacturers produce 500-600 units yearly, leaving approximately 1200 boats for imports. Present import sources are mainly neighbouring countries and Denmark.

MOTOR BOAT SHOW

SHOW: SWISS BOOT INT'L, Zurich
Non-ocean going vessels for sportsmen
DATE: February
FREQ: Biennial
SIZE: 12,173m2

MARKET: International
COUNTRIES REPRESENTED: N/A

ATTEND: EXHIBITORS: 200
TRADE: Included
PUBLIC: 47,500

COST: Upon request

ORGANIZER: ZUSPA

CONTACT:
Special Exhibitions Zurich
Thurgauerstrasse 7, P.O. 8050
Zurich
Switzerland
TEL: 01/311 50 55
FAX: 01 311 97 49

ADDITIONAL SOURCES OF INFORMATION

Canadian Embassy
Kirchen Feldstrasse 88
CH - 3005 Berne
Switzerland
TEL: (011-41-31) 44-63-81
TLX: (45) 911308 (DMCN)
FAX: (011-41-31) 44-73-15

SWITZERLAND

IMPORTERS - MOTOR BOATS

Aqua Sport AG
La Binnaz 673
CH-1786 Sugiez
TEL: (37) 73 19 18

J.W. Signer-Schuchter
Untere Bahnhofstr. 16
CH-8580 Amriswil
TEL: (71) 67 13 07

Faul & Co.
CH-3235 Erlach
Tel: (32) 88 13 39

Bucher & Schmid
Bootswerft
Alpenquai 13
CH-6005 Lucerne
TEL: (41) 44 22 67
FAX: (41) 44 12 70

Forsa-Spiboot Heinz Forster
Steinerstr. 487
CH-8253 Diessenhofen
TEL: (53) 37 24 47

Furer Bootsbau AG
Seestrasse 37
CH-3600 Thun
TEL: (33) 22 30 17

Hensa Werft
Seestr. 36
CH-8852 Altendorf
TEL: (55) 63 11 26

Bernhard Rohn
Bootswerft
CH-2513 Twann, Wingreis
TEL: (32) 85 17 97
FAX: (32) 95 16 23

Sarne, Santag
Essi Paktabe
CH-6340 Baar
TEL: (42) 32 13 35

SWITZERLAND

MANUFACTURERS - BOATS

Boesch
Seestr. 197
CH-8802 Kitchberg

E. Brunnert-Grimm AG
Werft
CH-8274 Gottlieben

Meinrad Helbling AG
CH-8716 Schmerikon

Istema
Stansstaderstr. 104
CH-6370 Stans

H. Lehmann
Aeussere Mutten
CH-4500 Solothurn

F. Pedrazzini
Seestr. 59-61
CH-8806 Bach

Portier AG
Yachtwerft
Seestrasse
Ch-8706 Meilen

Dr. Scheurer
Schneiderstr. 4b
CH-2560 Nidau

K. Schweizer S.A.
Bateaux
CH-1400 Yverdon-les-Bains

Alain Stampfli
25, ch. du Pécos
CH-1422 Grandson

Faul AG
Yachtwerft
Seestrasse 5
Ch-8810 Horgen

UNITED KINGDOM - BOATING INDUSTRY & MARKET

The British boating industry trade organization is the British Marine Industries Federation (BMIF).

The Federation has over 1,000 members and presides over a boat park of 800,000 to 1 million boats. This is an approximate figure as there is no central registration of boats in the U.K.

There are some 600 boat builders in the U.K. and these have been sustained by a boating industry that was stronger and fitter in 1988 than ever before, according to the B.M.I.F. President. Exports reached Pounds Sterling 127 million in the first ten months.

The attached statistics covering 1983 to 1986 show the trade in imports and exports as well as those for the domestic market.

MAJOR BOAT SHOWS

SHOW: BRITISH MARINE TRADE EXHIBITION, London
Boating & marine equipment; engines & accessories
DATE: Oct 23-25 1990
FREQ: Annual
SIZE: 5,000m^2g

MARKET: International COUNTRIES REPRESENTED: 10

ATTEND: EXHIBITORS: 300 TRADE: 5,000 PUBLIC: Nil

COST: Pounds 350./booth

ORGANIZER: NAT'L BOAT SHOWS LTD.

CONTACT: Boating Industry House
Vale Road, Oatlands Park
Meybridge, Surrey
England KT13 9NS
TEL: 0932/854511
FAX: 0932/852874

RATE OF EXCHANGE: 1988 POUND STERLING = C$2.19

UNITED KINGDOM

SHOW: CALSHOT SMALL BOAT SHOW
Southampton
Buy & sell boats, canoes & Other water sports equipment

DATE: May
FREQ: Annual
SIZE: 6,000m^2

MARKET: Regional

COUNTRIES REPRESENTED: 1

ATTEND: EXHIBITORS: 300

TRADE: Included PUBLIC: 5000

ORGANIZER: CALSHOT ACTIVITIES CENTRE

COST: Upon request

CONTACT: Fair Organizer
Calshot Spit, Fawley
Southampton
England S04 1BR
TEL: 0703/892077
FAX: 0703/891267

UNITED KINGDOM

ADDITIONAL SOURCES OF INFORMATION

British Marine Industries Association
Boating Industry House
Vale Road, Oatlands
Weybridge, Survey
KTB 9NS
TEL: (932) 854511
TLX: 885471
FAX: (932) 852874

Canadian High Commission,
MacDonald House
One Grosvenor Square
London, England
W1X 0AB
TEL: (011-44-1) 629-9492
TLX: (51) 261592 (CDALDN G)
FAX: (011-44-1) 491-3968

UNITED KINGDOM

MARINE INDUSTRY TURNOVER ESTIMATES

	1986	1985	1984	1983
	Pounds Sterling (Millions)			
Boat Building	162.0	118.8	91.6	88.1
Inflatables	11.0	10.6	9.0	8.8
Sailboards	3.0	3.7	3.5	3.5
Services				
Boatyard/Repairs	24.0	20.7	19.2	18.1
Hiring	14.5	12.7	11.9	9.6
Brokers	6.5	5.8	5.0	5.3
Marinas	15.5	11.6	10.8	10.3
Chandlery	188.0	149.9	127.3	103.0
Engines	75.0	60.3	52.1	48.9
	499.5	394.1	330.4	295.6
Of which				
EXPORTS were:				
Boats	97.1	86.3	62.5	52.6
Engines	3.0	3.5	3.8	2.7
	100.1	89.8	66.3	55.3
IMPORTS were:				
Boats	41.2	30.3	25.8	27.8
Engines	11.6	12.1	10.7	9.6
	52.8	42.4	36.5	37.4

RATE OF EXCHANGE:		
	1983	Pound Sterling = C$1.87
	1984	= C$1.73
	1985	= C$1.77
	1986	= C$2.04

UNITED KINGDOM

INDUSTRY STATISTICS

BALANCE OF TRADE -
Exports Less Imports in Pounds Sterling (Millions)

( ) = Excess Imports over Exports

	1986	1985	1984	1983
Sailboats				
More than 12m	5.8	11.5	8.6	1.3
Less than 12m	12.3	10.1	5.7	7.5
Power Boats				
More than 12m	1.9	3.9	2.0	4.2
Less than 12m	28.6	24.5	11.9	9.6
Other Boats				
(Inc. O/B Powered)	8.0	7.5	8.5	5.1
	56.6	57.5	36.7	27.7
Engines				
Outboard	(8.1)	(8.7)	(7.3)	(6.7)
Inboard	(0.5)	(0.1)	0.4	(0.2)
Inflatables	1.7	2.1	2.7	0.6
Sailboards	(2.4)	(3.6)	(2.7)	(3.5)
OVERALL BALANCE	47.3	47.2	29.8	17.9

UNITED KINGDOM

INDUSTRY STATISTICS

	1986	1985	1984	1983
	Pounds Sterling (Millions)			
EXPORTS				
Pleasure Craft				
Sail . Above 12m	17.5	17.6	15.7	14.0
. 7.5m - 12m	15.7	16.2	8.2	9.0
. Below 7.5m	5.0	4.0	4.0	3.6
Power . Above 12m	13.4	7.2	4.2	5.6
. 7.5m - 12m	26.8	22.9	11.2	8.2
. Below 7.5m	5.6	4.6	3.1	3.4
Other Inc.O/B powered				
. Above 7.5m	3.8	4.3	6.0	3.4
. Below 7.5m	5.4	4.2	3.9	2.6
	93.2	81.0	56.3	49.8
Inflatables Above 2m	2.5	3.3	3.7	1.7
Sailboards	1.4	2.0	2.5	1.1
Engines				
. Outboard	1.3	1.6	1.6	1.4
. Inboard	1.7	1.7	2.2	1.3
	100.1	89.6	66.3	55.3

UNITED KINGDOM

	1986	1985	1984	1983
	Pounds Sterling (Millions)			
IMPORTS				
Pleasure Craft				
Sail . Above 12m	11.7	6.1	7.1	12.7
. 7.5m - 12m	6.7	8.9	5.3	4.1
. Below 7.5m	1.7	1.2	1.2	1.0
Power . Above 12m	11.5	3.3	2.2	1.4
. 7.5m - 12m	2.6	2.0	1.6	1.2
. Below 7.5m	1.2	1.0	0.8	0.8
Other Inc. O/B powered				
. Above 7.5m	0.4	0.1	0.7	0.5
. Below 7.5m	0.8	0.9	0.7	0.4
	36.6	23.5	19.6	22.1
Inflatables Above 2m	0.8	1.2	1.0	1.1
Sailboards	3.8	5.6	5.2	4.6
Engines				
. Outboard more than 325cc	2.9	6.8	5.9	5.2
. Outboard less than 325cc	6.5	3.5	3.0	2.9
. Inboard 15Kw to 30Kw	1.1	0.8	0.3	0.7
. Inboard less than 15Kw	1.1	1.0	1.5	0.8
	52.8	42.4	36.5	37.4

UNITED KINGDOM

EXPORTS OF PLEASURE CRAFT - SAILBOATS

(Figures given in brackets under No. of Boats are 1985 figures)

Country	No. of Boats 1986 (1985)						Value Pounds '000	
	+12m		7.5-12m		-7.5m		1986	1985
U.S.A.	45	(54)	78	(176)	100	(137)	9,792	13,924
Spain	14	(11)	20	(19)	44	(25)	1,764	3,519
France	14	(12)	85	(52)	298	(235)	6,534	3,258
Carribean	2	(13)	2	(10)	11	(23)	321	3,075
W. Germany	20	(3)	33	(30)	229	(145)	2,449	1,307
Canada	4	(4)	8	(29)	7	(47)	533	1,264
Italy	12	(4)	5	(2)	54	(11)	478	1,245
Netherlands	24	(4)	32	(21)	92	(104)	1,672	1,237
Portugal	3	(4)	4	(5)	10	(2)	427	1,094
Greece	5	(3)	11	(13)	6	(23)	878	854
Norway	15	(8)	32	(10)	95	(36)	2,096	853
Irish Rep.	3	(4)	8	(9)	34	(38)	411	504
Gulf States	14	-	4	(5)	23	(67)	1,703	410
Hong Kong	2	(1)	-	(1)	7	(13)	126	278
Australia & New Zealand	9	(2)	4	(2)	14	(3)	968	232
	186	(127)	326	(384)	1024	(919)	30,152	33,054
Other Countries	36	(20)	72	(45)	295	(363)	8,048	4,710
TOTAL	222	(147)	398	(429)	1319	(1282)	38,200	37,764

UNITED KINGDOM

EXPORTS OF PLEASURE - INBOARD POWERED BOATS

(Figures given in brackets under No. of Boats are 1985 figures)

Country	No. of Boats 1986 (1985)						Value Pounds'000	
	+12m		7.5-12m		-7.5m		1986	1985
France	28	(17)	161	(137)	80	(95)	14,551	7,344
Spain	3	(7)	53	(53)	54	(35)	3,695	5,465
U.S.A.	16	(6)	29	(41)	36	(45)	4,342	4,266
W. Germany	6	(8)	42	(50)	221	(161)	3,467	2,752
Norway	23	(7)	76	(36)	101	(38)	6,014	1,996
Italy	1	(4)	29	(26)	18	(18)	1,904	1,796
Netherlands	12	(7)	22	(28)	30	(26)	1,852	1,687
Gulf States	3	(2)	8	(17)	24	(44)	684	1,637
Sweden	3	(3)	28	(19)	14	(13)	2,081	1,288
Greece	2	(2)	9	(18)	3	(17)	814	1,177
Switzerland	-	(1)	20	(11)	11	(21)	1,010	562
Malta	-	-	1	(2)	2	(2)	164	50
Irish Rep.	2	(5)	3	(4)	16	(28)	114	190
Carribean	1	(2)	1	-	5	(6)	110	138
South Africa	-	-	-	(1)	3	(1)	2	33
Canada	-	-	11	(1)	8	-	671	47
Portugal	1	-	-	(1)	1	-	167	20
	101	(71)	493	(445)	627	(550)	41,642	30,448
Other Countries	29	(5)	59	(59)	111	(103)	4,190	4,279
TOTAL	130	(76)	552	(653)	738	(653)	45,832	34,727

UNITED KINGDOM

EXPORTS OF PLEASURE CRAFT - INFLATABLES

Country	More than 2m in length		Value Pounds'000	
	1986	1985	1986	1985
U.S.A.	3,606	5,376	1,833	32,721
Netherlands	63	157	49	55
Turkey	4	-	3	-
South Africa	255	63	40	44
Canada	57	40	45	22
Egypt	2	-	4	-
Carribean	40	12	37	8
Gulf States	25	22	25	21
New Zealand	11	4	8	2
Ireland	41	89	24	63
France	51	9	35	8
Greece	10	28	6	13
Sri Lanka	-	-	-	-
Sweden	7	273	7	32
W. Germany	63	38	25	46
Singapore	63	41	21	27
Hong Kong	49	17	37	16
Italy	16	11	14	13
Australia	12	48	6	27
	4,496	6,276	2,314	3,158
Other Countries	1,101	189	183	105
TOTAL	5,597	6,465	2,497	3,263

UNITED KINGDOM

EXPORTS OF PLEASURE CRAFT - SAILBOARDS

Country	Value - Pounds'000			
	1986	1985	1984	1983
Netherlands	319	214	546	681
Sweden	75	94	537	263
France	155	78	259	316
Canada	35	110	247	62
U.S.A.	177	446	223	51
Norway	119	158	192	62
Spain	37	60	105	18
W. Germany	60	78	81	80
Gulf States	19	59	46	39
South Africa	2	2	30	16
Irish Rep.	20	46	36	16
Belgium/Lux.	10	10	29	20
Australia	4	12	29	19
Denmark	80	86	29	-
Japan	80	99	23	-
Carribean	6	22	16	8
Italy	12	10	10	13
Greece	18	17	7	7
Swtizerland	-	2	4	28
Finland	15	25	2	7
Israel	27	39	-	-
Hong Kong	61	271	-	-
	1,331	1,938	2,451	1,706
Other Countries	45	80	67	58
TOTAL	1,376	2,018	2,518	1,764

UNITED KINGDOM

EXPORTS OF PISTON ENGINES - OUTBOARD

Country	No. of Engines -325cc		No. of Engines +325cc		Value Pounds '000			
	1986	1985	1986	1985	1986	1985	1984	1983
U.S.A.	29	757	54	269	105	356	584	571
Irish Rep.	294	333	235	50	199	136	309	175
Greece	259	260	1	6	70	69	141	79
Iran	-	-	-	-	-	-	99	56
Italy	5	200	53	2	20	46	57	85
France	150	41	27	14	83	24	53	-
Spain	1	4	6	5	13	11	39	18
W. Germany	10	3	120	177	308	180	-	-
Nigeria	-	8	161	403	308	241	33	31
India	-	-	-	-	-	-	30	11
Turkey	2	2	1	4	4	30	29	-
Sudan	16	2	1	2	6	9	26	19
Australia	-	3	2	1	3	3	23	-
Canada	1	105	5	-	11	40	14	28
Belgium/Lux.	36	6	93	3	118	18	11	19
Netherlands	-	79	11	5	12	16	11	37
Ghana	6	5	4	2	18	4	10	46
Egypt	2	-	-	1	3	2	10	-
Sweden	1	3	-	-	1	2	9	19
Finland	6	6	1	-	6	4	5	11
	818	1,817	775	944	1,288	1,191	1,493	1,205
Other Countries	48	180	35	533	69	371	155	231
TOTAL	866	1,997	810	1,477	1,357	1,562	1,648	1,436

UNITED KINGDOM

EXPORTS OF PISTON ENGINES - INBOARD

Country	No. of Engines -15 Kw		No. of Engines +15 Kw		Value Pounds '000	
	1986	1985	1986	1985	1986	1985
South America	35	38	-	27	14	67
U.S.A.	13	136	74	170	225	366
W. Germany	-	10	41	10	69	12
Greece	17	24	31	40	79	140
Irish Rep.	21	50	29	16	86	84
Finland	2	-	8	6	17	13
Denmark	1	11	5	5	12	22
Norway	1	6	15	11	27	26
Israel	-	-	4	1	8	2
Netherlands	25	13	25	49	121	108
Australia	13	130	29	47	81	122
Italy	60	65	18	15	129	90
France	5	2	13	11	29	27
Indonesia	-	-	-	-	-	-
Portugal	4	-	4	1	24	3
South Africa	1	75	2	-	6	56
Belgium/Lux.	17	-	2	5	24	7
Carribean	18	46	5	24	20	72
Canada	8	25	8	23	33	73
Gulf States	88	96	-	-	62	69
	329	727	313	461	1,096	1,359
Other Countries	217	110	209	153	596	499
TOTAL	546	837	522	614	1,692	1,858

UNITED KINGDOM

IMPORTS OF PLEASURE CRAFT - INBOARD POWERED

(Figures given in brackets under No. of Boats are 1985 figures)

Country	No. of Boats 1986 (1985)						Value Pounds'000	
	+12m		7.5-12m		-7.5m		1986	1985
France	118	(9)	13	(33)	7	(15)	568	1,289
U.S.A.	3	-	9	(2)	87	(18)	974	324
Taiwan	11	(1)	1	-	-	-	1,208	70
Norway	-	-	7	(3)	18	(17)	338	322
Italy	1	-	5	(2)	4	(11)	333	175
Netherlands	10	(1)	9	(7)	1	(1)	9,813	870
Sweden	-	(1)	8	(5)	9	(4)	621	305
Singapore	1	-	1	-	-	-	206	-
Belgium/Lux	-	(1)	-	(2)	1	-	5	47
Spain	4	(1)	5	(5)	1	(4)	546	2,322
Denmark	-	-	5	(1)	-	-	215	64
Finland	-	-	1	-	1	-	135	-
Irish Rep.	1	-	-	(1)	7	(10)	92	101
W. Germany	3	(1)	-	(3)	3	(7)	55	221
	152	(15)	64	(64)	139	(87)	15,109	6,110
Other Countries	35	(1)	1	(3)	3	(6)	182	190
TOTAL	187	(16)	65	((67)	142	(93)	15,391	6,300

UNITED KINGDOM

IMPORTS OF PLEASURE CRAFT & OTHER BOATS

INCLUDING OUTBOARD POWERED

Country	No. of Boats 1986 (1985)				Value Pounds '000	
	-7.5m		+7.5m		1986	1985
France	15	(14)	2	(3)	168	212
U.S.A.	50	(218)	2	-	185	474
Norway	7	(7)	-	-	9	70
W. Germany	9	(10)	4	-	93	55
Irish Rep.	11	(8)	2	-	54	8
Portugal	8	(35)	-	-	14	34
Denmark	3	-	1	-	33	-
Italy	5	(9)	-	-	60	21
Sweden	-	(1)	1	-	15	23
Finland	-	(3)	-	-	-	24
Spain	1	(11)	1	-	14	15
Netherlands	3	(4)	4	(1)	169	77
Canada	-	-	-	-	-	-
Belgium/Lux	7	(2)	-	-	4	1
	119	(322)	17	(4)	818	1,014
Other Countries	252	(4)	-	-	340	33
TOTAL	372	(326)	17	(4)	1,158	1,047

UNITED KINGDOM

IMPORTS OF PLEASURE CRAFT - INFLATABLES

Country	More than 2m in length		Value Pounds'000	
	1986	1985	1986	1985
France	1,248	2,411	279	681
Japan	532	376	137	91
Italy	8	84	3	20
W. Germany	1,041	798	178	165
Taiwan	1,944	3,639	27	101
U.S.A.	68	166	4	5
Irish Rep.	2	6	1	6
Spain	232	1	38	1
Canada	12	-	9	-
Netherlands	33	-	14	-
Austria	167	-	49	-
Yugoslavia	312	879	50	105
Sweden	5	-	2	-
Singapore	-	7	-	7
	5,604	8,367	791	1,182
Other Countries	53	16	16	13
TOTAL	5,657	8,383	807	1,195

UNITED KINGDOM

IMPORTS OF PLEASURE CRAFT - SAILBOARDS

Country	Value - Pounds '000			
	1986	1985	1984	1983
W. Germany	809	1,784	1,700	1,588
Netherlands	632	884	1,145	1,377
Switzerland	394	724	819	545
France	667	478	513	594
Sweden	142	450	401	115
Austria	784	742	273	116
Italy	126	147	86	46
Denmark	1	16	50	25
Australia	66	54	45	13
Belgium/Lux	2	77	42	22
U.S.A.	50	61	31	70
Irish Rep.	13	37	24	17
Hong Kong	3	4	8	-
Spain	3	13	7	55
Taiwan	4	-	-	-
	3,696	5,471	5,144	4,583
Other Countries	106	113	22	4
TOTAL	3,802	5,584	5,166	4,587

UNITED KINGDOM

IMPORTS OF PISTON ENGINES - OUTBOARD

Country	No. of Engines - 325 cc		No. of Engines +325 cc		Value Pounds '000	
	1986	1985	1986	1985	1986	1985
Belgium/Lux	6,968	6,171	3,462	4,431	5,164	5,211
Japan	5,464	10,217	2,368	3,825	3,556	4,885
U.S.A.	390	136	269	15	398	83
France	-	3	2	2	9	7
Irish Rep.	7	-	5	-	8	-
Netherlands	138	26	23	58	58	74
Italy	-	1	17	8	14	13
Austria	-	-	50	-	20	-
W. Germany	12	41	181	9	185	8
Denmark	1	-	-	-	1	-
Yugoslavia	-	-	-	-	-	-
Egypt	-	-	9	-	4	-
Switzerland	-	50	76	-	29	4
	12,980	16,645	6,462	8,349	9,446	10,285
Other Countries	31	13	4	1	17	9
TOTAL	13,011	16,658	6,466	8,349	9,463	10,294

UNITED KINGDOM

IMPORTS OF PISTON ENGINES - INBOARD

Country	No. of Engines -15 Kw		No. of Engines +15Kwto+30Kw		Value Pounds '000	
	1986	1985	1986	1985	1986	1985
W. Germany	126	96	38	318	163	386
Japan	474	378	115	154	588	466
Sweden	83	6	155	2	301	11
Denmark	2	418	40	86	55	540
Netherlands	36	99	97	27	218	178
Italy	893	40	75	9	646	43
U.S.A.	-	4	4	-	12	9
Norway	-	4	6	7	13	27
Irish Rep.	13	-	1	-	5	-
Finland	-	-	1	-	2	-
Austria	-	-	-	-	-	-
France	13	11	44	165	126	88
Belgium/Lux	-	5	20	3	38	7
Spain	1	5	-	-	1	5
	1,641	1,066	596	596	2,168	1,760
Other Countries	-	2	63	1	36	4
TOTAL	1,641	1,068	659	772	2,204	1,764

APPENDIX I

RATE OF DUTY

Yachts and other vessels for pleasure or sport: rowing boats and canoes:

European Community (Duties are applied ad valorem)

Inflatables	-	under 100 kg, less than 2.5m	3.8%
	-	others	2.5%
Sailboats	-	seagoing	free
	-	under 100 kg	3.8%
	-	others	2.5%
Motorboats (other than outboard motorboats)			
	-	seagoing	free
	-	other	2.5%
Other boats	-	under 100 kg	3.8%
	-	other	2.5%

Finland (Duties are applied per kilo)

All boats	6.2%

Sweden (Duties are applied ad valorem)

Rowing boats and canoes	free
All other boats	3.8%

Switzerland

All boats	free

APPENDIX II

GENERAL OBSERVATIONS & MARKET TRENDS*

It is sometimes said that what happens to the boating industry in the USA warns the rest of the world's boating industry what is likely to happen to them in one or two years time.

The USA has as many recreational craft as the rest of the world put together, so it is right that other countries should carefully watch what is happening there. Certainly, in both going into the recession at the end of the 1970's and coming out of it again in the early 1980's the USA led the way.

The warning signal that is now noticeable in the USA, but is certainly not yet apparent in the rest of the world, is that the 7 years of upward rise in US industry conditions is levelling out. This seems to be due to the financial confidence of the United States public not being so strong, so that whereas the United States consumers were in the habit of buying a boat and then working out how to pay for it, in late 1989 there is a certain hesitancy, which is making people think more deeply about their financial position and the possibility that the value of their personal investments might fall, before buying a boat.

The good news is that the money is not being spent on some other recreational activity, but is being put into savings.

This hesitancy is not echoed at all in European countries, where generally trade continues to increase and boatshow interest and attendance is most encouraging.

The problem of the shortage of skilled craftsmen in our industry continues, although there are signs of improved training facilities being provided.

In Germany there are good reports from every section of the industry. After a 31% increase in imports in 1988, both exports (+ 16.8%) and imports (+ 15.8%) have increased during the first half of 1989.

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*Source: Boating Industry Reports 1989 Statistics 1988, International Council of Marine Industry Associations.

Boatyards building custom-built boats are reporting long delivery periods, and mass-production boatbuilders report good sales, but in a market of increasing competition.

There is an increase in sales to charter companies of boats in the 12-14 metre range, and manufacturers of top quality accessories report a strong increase in trade.

The effect of the 1986 tax laws in Denmark is still having its effect. Domestic sales are still very low, being 40% of what they were in 1986. However, manufacturers saw their chance in exporting, and exports of DKK 700-800 million are 50% higher than in 1986. The traditional sailboat market, which is 2-3 times the size of the motorboat market, is under pressure from the motorboat market, but is holding its own by developing more comfortable sailboats of the motor-sailer type, using new designs and new materials.

Finland reports a particularly good year. Domestic demand has been vigorous, encouraged by good boating weather. In fact, the domestic market has been so strong that imports have increased in order to cater for a whole new consumer group who are newcomers to boating.

There has been a noticeable increase in motorboat-building facilities, involving the latest production methods.

It is many years since so many new designs for both sailboats and motorboats have been introduced in the same year, and prospects look good for 1990.

The strength of the French economy has had a beneficial effect on the French boating industry, especially resulting in considerably increased exports to other EEC countries. The striking increase in motorboat production, particularly from traditional sailboat companies is changing the output of motorboats from small runabouts to larger cabin cruisers, often of high quality.

In an effort to satisfy consumer demand at the lower end of the sailboat market, smaller sailboat cruisers are coming on to the market to appeal to a new breed of customers who cannot afford the larger boats.

This new sailboat trend has not affected the luxury upper end of the sailboat market, which is continuing to do very well.

Improved design and durability of accessories, and new standards of reliability and the improved presentation of electronic data is also maintaining a good market in marine equipment.

The Italian domestic market for boats produced in Italy is up 15%, and imported boats are up 51%, making imports 31% of total sales. Exports of boats have remained almost steady since 1987 (up 1%).

The export of accessories has been exceptionally good, amounting to ITL 300 milliard for the past year.

Outboard engine imports were ITL 81 milliards, of which ITL 59 milliard came from Belgium. Engine exports, both outboard and inboard engines, totalled ITL 10.1 milliards.

Overall, there is optimism for the future, particularly since recent changes in national fiscal policy have eased taxes and financial restrictions for the boating public.

In Sweden, 1989 has been the third consecutive year with an improved domestic market. The sale of new boats has gone up from 16,000 boats in 1986 to over 25,000 in 1989. Of these, about 1,000 are sailboats.

Domestic production has not been able to cope with the pressing demand for new motorboats, and imports have now trebled to 50-60% of the market.

The ten largest exporters of Swedish boats report a 10% increase over 1988, with increased export to the Far East. Scandinavia and West Germany remain the most import export markets.

Swiss boatbuilders are faced with the serious shortage of berths and moorings, so that the total number of boats in use is virtually fixed.

It is therefore necessary for the industry to concentrate on repair, fitting-out and maintenance services, all of which is keeping the boatyards fully employed.

The United Kingdom marine industry turnover now stands at over 600 million pounds. The UK's balance of trade in boating goods continues to be positive. Exports exceed imports by 100 million pounds.

The home market has benefitted from exceptionally good boating weather in 1989 with most boatowners making good use of their boats. Based on previous experience, this should help towards good business for 1990. There is concern about high interest rates which has affected sales in the UK of new and used boats.

The strongest sector of the UK industry has been motorboats with leading firms exporting more then 70% of their production. Exports of luxury powerboats have more than doubled from 34.7 million pounds in 1985 to 77.3 million pounds in 1988.

There has been a drop in imports of sailboats and a recovery in the export of British sailboats to Europe and the USA.

The UK boating equipment industry continues to grow through new product innovation and investment. Sales have increased at home and in export markets.

SUMMARY

The European boating industry, apart from Norway, continues to do well with strong international trade as well as home production for domestic markets.

There are signs of a reducton of sales in the United States, but there are no indications in Europe that the present conditions will not continue into 1990.